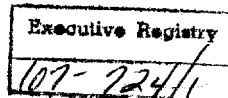


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DD/S 67-0973

23 FEB 1967

MEMORANDUM FOR: Executive Director-Comptroller

Attached are the Director of Personnel's proposals for the Retiree Placement and Counseling Program. I am sending this paper forward for your consideration even though it is not, in my opinion, fully responsive to the main points we agreed upon in our 20 December 1966 meeting. The one point that all agreed to at that meeting was a concerted effort to link up with private schools and public schools under the various state educational systems for determination of teaching positions for which our retirees might qualify. The DD/P was fully prepared to assign officers to assist Personnel in the canvass of and negotiation with such schools. I think this understanding has been missed in this paper.

Rather than delay this program further I submit this for consideration so that we can develop definite guidance to Personnel as to their program direction.

SIGNED R. L. Bannerman

R. L. Bannerman

Att: Memo dtd 20 Feb 67 for ExDir-Compt
fr D/Pers, subj: Expanded Retiree
Placement and Counseling Program

Distribution:

- Orig - Adse w/O att
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DNS 64-0928

20 FEB 1967

Executive Registry
67-724

MEMORANDUM FOR: Executive Director-Comptroller

SUBJECT : Expanded Retiree Placement and Counseling Program

1. This memorandum submits for your formal approval in principle our plans for improving our present retiree placement program and the incorporation of this program within a completely reorganized counseling program designed to condition and prepare employees for retirement. These recommendations are summarized in paragraph 2.

2. First, a few words about the purpose of this program. Our objective is to effect the early retirement of CIA employees with minimum adverse effect on employee morale, without endangering the security of Agency operations or political relationships, and without damage to the Agency's image as an employer. As you know, I have recently recommended the establishment of age 60 as the normal Agency retirement age for employees under either the CIA or the Civil Service Retirement Systems. In addition, as you know, employees covered under the CIA Retirement System may retire voluntarily or be retired by the Director as early as age 50; employees under the Civil Service Retirement System may retire as early as age 55 with 30 years of service. The result of these policies and options will be the retirement of many people who are still young enough to continue in other employment and who may need or desire additional income to supplement their retirement annuities. These people are generally ill-prepared to enter, or even to explore, the general employment market. In addition, most of them share in a general human reluctance to consider themselves as "retired" and, consequently, are unlikely to engage in retirement planning unless induced to do so.

3. The program which we are proposing will be a forceful, interesting program covering a five-year span. All employees will be expected by Agency management to participate in due course unless they decline to do so. Employees who indicate early that they will need or desire full-time employment after retiring from the Agency will receive a special, phased program of counseling, training, and assistance. For those not interested in full-time, post-retirement employment, there will be recurring periods of counseling, but primary emphasis will occur in the two years preceding retirement.

4. The basic objectives of the expanded program will be (a) to bring about early and realistic awareness of impending retirement and its concomitant problems, and (b) to induce the individual to take constructive steps to meet these problems. In presenting our proposed program, we are making a somewhat artificial separation between employment counseling and assistance and counseling as general preparation for retirement. In fact, the two overlap with differences only in phasing and emphasis.

SUBJECT: Expanded Retiree Placement and Counseling Program

5. Post-Retirement-Employment Counseling and Assistance

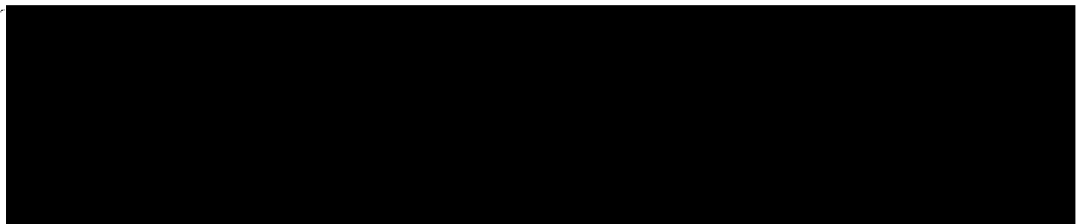
Our new program contemplates a substantially augmented effort to identify at an early stage those individuals who will need or desire significant post-retirement employment. In addition, it contemplates a far more aggressive and more wide-ranging search for employment opportunities. In brief, our new program provides:

a. Assistance in the identification of aptitudes, latent or overlooked talents, and hidden desires for self-gratification and expression. Such assistance will be accomplished through exposure to many fine books on the subject, seminars by experts in the field, the use of aptitude and attitude studies where indicated, and finally, through individual counseling. We contemplate extensive use of the Assessment and Evaluation Staff in this element of the program.

b. Assistance and training in the preparation of resumes and applications. We already provide advice and assistance in this area, including editing of materials, obtaining Security and Cover clearances where needed, and in providing reproduced copies as required. We propose to amplify the present service by seminars and training sessions in the writing and adaptation of letters of application and resumes so that the individual himself is competent to adjust them to varying employment opportunities.

c. Development of job leads. This is the area in which our present program most needs improvement and expansion. Without defending the rather meager efforts made to date (because I think you know as well as I do why we have not had a more vigorous program), I have several proposals for improving it. (These are not necessarily listed in order of importance.)

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(a) Identify and establish relationships with appropriate officials of suitable companies through whom resumes and applications can continually be submitted. The objective here is an extensive register of companies willing to consider properly qualified older workers.

(b) Conduct a continuing survey to identify companies having extensive overseas operations or contemplating such operations. The objective here is to identify companies

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SUBJECT: Expanded Retiree Placement and Counseling Program

most likely to need persons having area knowledge, experience, and contacts for employment either overseas or in home offices, or as consultants.

(2) The compilation of an inventory of Agency officials having close contacts with senior officers of non-governmental organizations so that the active support of these officers can be sought in connection with the employment search of particular individuals for whom such special sponsorship would be appropriate.

(3) Expansion of our existing recruitment contacts with the various State Employment Service offices to register Agency retirees under the "older worker" program in any area to which they may desire or be willing to relocate.

(4) Achieve maximum utilization of the various Agency projects which can appropriately use retirees as part- or full-time contract employees (for example, the qualifications coding project in Personnel and MI [REDACTED]). Where security considerations permit, proprietary activities should also be included in this category. In this connection, we propose the following:

(a) Establishment of a "Skills Bank" of pending and actual retirees.

(b) Establishment of a policy that contract vacancies will be filled whenever possible by qualified retirees.

(c) Establishment of a policy of enforced rotation of contract jobs which are of long-term duration.

(5) Operation of a "help-wanted" advertisement screening service seeking to match current advertised vacancies to applicants in the "Retiree Skills Bank."

(6) Development of more comprehensive contacts with the academic community to facilitate the referrals of retirees desiring to enter the teaching profession. In this connection, we will develop a library of information about the academic requirements for teacher certification in various jurisdictions or will be prepared upon request to make inquiry of appropriate authorities controlling any specific school jurisdiction.

(7) Development of a library of publications concerning individual franchise businesses for retirees desiring self-employment and if warranted qualified speakers on the subject.

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SUBJECT: Expanded Retiree Placement and Counseling Program

6. Training for Post-Employment

Another area to be thoroughly explored is that of assisting individuals to acquire or refresh qualifications in specific vocational fields. I am not prepared at this time to make any specific recommendations as to the extent the Agency should sponsor or support a prospective retiree in this regard. However, such assistance and support might range from advising individuals of the availability of educational needs and opportunities, adjusting hours of work or assignments to accommodate the training, to continuing the employee's salary and paying his tuition while he is engaged in full-time academic study. For example, it may be that post-retirement subsidization of such study can be justified (and legally authorized) for all participants in the CIA Retirement System who retire between the ages of 50 and 55. Formal proposals will be presented as soon as they can be properly developed and documented.

7. General Pre-Retirement Counseling

The proposed counseling program described below is completely new both in concept and in scope. Our research in this area of counseling has brought us in touch with senior officials of the American Association of Retired Persons. This organization has a twenty-year history of experience and a current membership of over one-and-a-half million persons. We believe that we have tapped a gold mine of information and have identified persons with high qualifications who could be engaged to participate both in the development and subsequent conduct of our program. I'm attaching as an example a draft of a comprehensive pre-retirement program which I have outlined using materials which the AARP provided us regarding the program of North American Aviation, Inc. (Tab A). The AARP officials have suggested also that we might find it worthwhile to meet with a Mr. Clark Tibbetts and Miss Martha Burton; Mr. Tibbetts is reported to be an authority in this field and Miss Burton is in charge of administering the pre-retirement program for the Bureau of Old Age and Survivors Insurance, which they regard as one of the best in government or industry. We will pursue these leads and may well recommend later that we enter into some contractual arrangement with AARP for consultant service in establishing our program; in the long run, this might be more economical than attempting to institute a program with the services of relative amateurs in the field. (I will mention later the possibility of providing special training to our own staff officers engaged in this program.)

Continuing with a review of our proposals in the counseling area, whether we develop our own independent program, or adapt our program from one in successful operation by another organization, or engage consultants to set it up for us, the counseling program would be expected to cover at least the following areas:

SUBJECT: Expanded Retiree Placement and Counseling Program

a. Through a system of early notification (at least five years in advance) stimulate prospective retirees to start thinking about retirement and, for those eligible for "early retirement", try to induce the individual to reach an early decision concerning his own early retirement.

b. To encourage, if not insist, prospective retirees to participate in the counseling program which would consist of lectures, seminars and individual counseling on the subject areas listed in Tab A.

c. Development of a pre-retirement manual such as the recent State Department issuance, New Directions, which is attached at Tab B.

8. The program which has been outlined above is ambitious and cannot be undertaken by my office without additional staffing. I frankly do not know at this time how large a staff might be required, but I think I have reached some conclusions concerning the kinds of people who are needed for key assignments. A senior Agency officer will be needed to launch this program and sell it in and out of the Agency. This officer might be a retired officer, such as [REDACTED], or an on-duty officer who might be detailed to the Office of Personnel for perhaps a year to initiate this program and supervise it until it is a going concern. Without meaning to go into personalities here, I think that [REDACTED] would be an excellent officer for such an assignment -- [REDACTED] might also be considered. These names are illustrative and certainly do not exhaust the possibilities. I hope that the regular staffing of this activity might be supplemented by the detail of carefully selected employees of any Agency Directorate who are nearing retirement age; such details would not only contribute manpower to this effort but might well operate on the "forty-plus Club" principle of finding employment for themselves while assisting others in the employment search. I have learned that the University of Chicago and the University of Michigan both offer full-term courses in the general field of retirement planning. I would suggest that individuals selected to become "permanent" members of our retiree placement and counseling staff be given the opportunity to take such courses.

9. In summary, then, the proposals which I am submitting for your approval in principle embrace:

a. Substantial expansion of our present post-retirement employment search program to (1) include participation by senior Agency officials, by the [REDACTED], and by State Employment

SUBJECT: Expanded Retiree Placement and Counseling Program

Services, (2) develop more comprehensive libraries of information about job opportunities for our prospective retirees, (3) to provide better utilization of existing facilities for assisting them in evaluating their employment skills and interests, and (4) above all, to be of greater assistance to these individuals in training them in the art of job-seeking.

b. Development as appropriate of an Agency-sponsored training program to equip individuals vocationally for post-retirement employment.

c. Utilization of the experience of other organizations, and perhaps consultative services or experts in the field, to develop a sound and integrated program of pre-retirement counseling.

d. Assignment to the Office of Personnel of officers of appropriate stature and qualifications to further develop and sell our proposed program.

e. Development of an appropriate training program to develop our own experts in this field.

/s/ Emmett D. Echols

Ernest D. Echols
Director of Personnel

Atto.

CONCUR:

See memo of 23 Feb 67
H. L. Engerman
Deputy Director
for Support

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The recommendations contained in paragraph 5 are approved.

LEO J. J. White

L. K. HARRIS
Executive Director-Comptroller

Approved:
 OF THE SUPPORTERS (1944-1945)
 1 - Mr. J. H. (1944-1945)
 2 - Mr. J. H. (1944-1945)
 3 - Mr. J. H. (1944-1945)
 4 - Mr. J. H. (1944-1945)

27 FEB 1961
Date

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Seminar Program for Successful Retirement

(Three hour sessions - once a week - seven or more weeks - in homogeneous groups of 15 to 20 people)

A. Employment Series

1. Placement Assistance Available - Non Fee Charging

- a. The Agency
- b. State Employment Service Offices
- c. College Placement Offices for alumni
- d. Professional Societies' Clearinghouses
- e. Forty-Plus Clubs
- f. Veterans Administration

2. Placement Assistance -- Fee Charging

- a. Private employment agencies
- b. Professional employment agencies

3. Determination of Employment Qualifications

4. How to look for a job

- a. Letters of Application
- b. Resume Preparation

5. Practical Training for Employment Interviews

(Individual counseling and review of interview experiences will be provided.)

B. Counseling Series

1. Retirement Systems Benefits

2. Financial Planning for Retirement

- a. Sources of income, plus tax benefits
- b. Social Security supplementation

- c. Pre- and Post-Retirement budgets
- d. Personal records and affairs
- 3. Supplementary Retirement Income
 - a. Supplementary employment
Possibilities, preparation for, how to organize job hunting campaign

NOTE: Supplementary individual counseling to be provided those actually preparing for job hunting
 - b. Supplementary self-employment
 - c. Volunteer activities
- 4. Leisure-time Activities
 - a. How to determine skills, interests, aptitudes, self-inventory
 - b. Meaning of work compensatory activities
 - c. Budgeting of time
- 5. Maintenance of Good Mental Health
 - a. Intellectual capacities of older people
 - b. Relationship between physical and mental health
- 6. Health -- Problems of Aging
 - a. Aging process: description
 - b. Establishing good health habits
 - c. Ills which are more common in later years
 - d. Where to retire
 - e. Community health facilities
- 7. Finance and Management of Savings

TRANSMITTAL SLIP			20 FEB 1967
TO: Director of Personnel			
ROOM NO. 5E56	BUILDING Headquarters		
REMARKS:			
FROM:			
ROOM NO.	BUILDING	EXTENSION	

ROUTING AND RECORD SHEET

SUBJECT: (Optional)

FROM:

Director of Personnel
5E56 Headquarters

EXTENSION

6825

NO.

DATE

28 FEB 1967

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S
INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. Deputy Director of
Personnel for Recruitment
and Placement 5E67

3-1-67

[Signature]

2. *DC/RD*

[Signature]

3.

4.

5.

6.

7.

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13.

14.

15.

As a priority assignment of great importance, I would like you and Don to study this carefully as the approved plan for the immediate expansion of our retirement program. What I need from you (in writing) is a breakdown of the things to be done into cohesive logical segments and a staffing plan to carry out the program. Bear in mind that the developmental phase may take more people than the continuing operation.

I strongly urge you and Don read the North American program and the HEW program which [REDACTED] has.

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After developing a staffing plan, think of possible candidates for the key jobs -- not limiting yourself to OP people.

I will need your views by COB 2 March.

[REDACTED]

25X1A

Emmett D. Echols
Director of Personnel